



National Status on Caregiver Assessment Initiatives

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National Consensus Development Conference *for* Caregiver Assessment

September 7-9, 2005

Convener:

FCA's National Center on Caregiving

Funded By:

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Goals:

1. Generate principles & guidelines for caregiver assessment
2. Build common ground among leaders committed to innovation & the systematic generation of new knowledge

National Consensus Development Conference *for* Caregiver Assessment

September 7-9, 2005

The Consensus Conference Achieved:

- Recognition of the importance of systematically assessing a CG's own needs in health care & HCBS settings
- Consensus on principles & practice guidelines
- Identification of change strategies to advance caregiver assessment as a basic component of practice
- Heightened interest among the invited leaders to take steps to promote caregiver assessment

Working Definitions

Family Caregiver (CG) – Any relative, partner, friend or neighbor who has a significant personal relationship with, and provides a broad range of assistance for, an older person or an adult with a chronic or disabling condition

Care Recipient (CR) – An adult with a chronic illness or disabling condition or an older person who needs ongoing assistance with everyday tasks to function on a daily basis

Working Definitions (cont'd)

Caregiver Assessment – A systematic process of gathering information that describes a caregiving situation & identifies the particular problems, needs, resources and strengths of the family caregiver.

- Approaches issues from the CG's perspective & culture
- Focuses on what assistance the CG may need & the outcomes the family member wants for support
- Seeks to maintain the CG's own health & well-being

Fundamental Principles for Caregiver Assessment

1. Because family caregivers are a core part of health care and long-term care, it is important to recognize, respect, assess and address their needs.
2. Caregiver assessment should embrace a family-centered perspective, inclusive of the needs and preferences of both the care recipient and the family caregiver.

Fundamental Principles for Caregiver Assessment (cont'd)

3. Caregiver assessment should result in a care plan (developed collaboratively with the CG), that indicates the provision of services and intended measurable outcomes.
4. Caregiver assessment should be multi-dimensional in approach and periodically updated.
5. Caregiver assessment should reflect culturally competent practice.

Fundamental Principles for Caregiver Assessment (cont'd)

6. Effective caregiver assessment requires assessors to have specialized knowledge and skills.
 - Practitioners & service providers' education & training should equip them with an understanding of the caregiving process & its impacts, as well as the benefits & elements of an effective caregiver assessment.

Fundamental Principles for Caregiver Assessment (cont'd)

7. Government and other third-party payers should recognize and pay for caregiver assessment as a part of care for older people and adults with disabilities.

Guidelines for Practice

General Considerations:

A. Programs should recognize key dimensions of family caregiving:

- The unit of care is the CR *and* the CG
- The CG is part of the treatment team and service plan
- Services should be consumer directed and family focused
- Caregiver assessment and support improves outcomes and continuity of care for the CR

Guidelines for Practice

General Considerations (cont'd):

B. Caregiver assessment should be tailored based upon the caregiving context, service setting and program

- There is no set protocol to follow for caregiver assessment & no single approach is optimal in all care settings & situations
- Purpose, ethical issues & technological resources & capabilities all have to be considered; these vary by settings & existing service programs

Guidelines for Practice

General Considerations (cont'd):

C. The reasons for conducting a caregiver assessment need to be clear to both assessor and caregiver.

These are:

- To identify the primary CG & other informal CGs
- To improve CG understanding of the role & abilities to carry out tasks
- To understand the caregiving situation – including service needs & unresolved problems – in order to meet the needs of the CG
- To identify services available for the CG & provide appropriate and timely referral for services

Guidelines for Practice

General Considerations (cont'd):

- D. Assessment findings should be used in care planning and service interventions
 - Assessment is not an end in itself but should empower CGs to make informed decisions & link CGs with community services
- E. Available information technology should be used to share assessment findings & make it easier for the CG to access help

Guidelines for Practice

Who Should Be Assessed?

- Anyone who self-identifies as a family caregiver should be offered a screening, leading to an assessment as appropriate
- Multiple caregivers within family may require group interview
 - Conflict resolution may be necessary

Guidelines for Practice

What Should Be Included in a Caregiver Assessment?

Assessment should be driven by:

- A conceptual framework
- The service context and programs
- Subjective perceptions and preferences along with objective characteristics of the CG
- Factors affecting CG ability to assume role

Guidelines for Practice

What Should Be Included in a Caregiver Assessment? (cont'd)

7 domains:

- 1.Context
- 2.CG perception of CR's health & functional status
- 3.CG values and preferences
- 4.Well-being of the CG
- 5.Consequences of caregiving
- 6.Skills/abilities/knowledge needed to provide care
- 7.Potential resources

Guidelines for Practice

When Should Assessment Occur?

- Early as possible
- Distinct from a “screening”
- Reassessment should be built into process
- Numerous entry points are needed

Guidelines for Practice

How and Where Should Caregiver Assessments be Conducted?

- Process should always be clear to CG
- CG preferences should be determined and accommodated in conducting the assessment

Guidelines for Practice

Who Should Conduct Caregiver Assessments?

- A range of professionals (e.g., physicians, nurses, social workers, care managers)
- Assessors need to be trained in CG assessment and have the requisite abilities, knowledge and skills

Conclusion

- Systematic caregiver assessment practices are both desirable and feasible
- The adoption of these principles and guidelines require a fundamental change of thinking in policy and practice

Conclusion

Consistent approaches to caregiver assessment would:

- Help practitioners better understand family needs & capacities
- Enable CGs to access support
- Assure optimal outcomes for the CR
- Provide solid information to policymakers & program administrators to improve service delivery